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To Develop Work Evaluation and Work Training Techniques Designed to Facilitate the Entry of Mildly Mentally Retarded into Service Occupations. Final Project Report.

Institute for the Crippled and Disabled, New York.

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Identifiers-Tower System

A project to develop a system of vocational evaluation and training to help the mildly mentally retarded (IQ 50 to 79) enter certain service occupations is described. Methods of procedure are discussed; these include research reading and surveys of both facilities for the retarded and commercial facilities. Specifications of jobs are presented in analysis charts; basic job factors and related work factors are outlined. Job activities and a training curriculum outline are given for the areas of janitorial and building maintenance, food service and handling, and hospital service work. Additional discussions are of on-the-job experience, and recommendations for the demonstration project including the project staff, client source, program schedule, and an outline of the proposed demonstration project. Eleven exhibits are presented giving further information on the job survey and on job evaluation; a bibliography lists 32 items. (LE)

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FINAL PROJECT REPORT
(September 1, 1964 - August 31, 1965)

I. IDENTIFICATION

A. The title of this research planning project is:

"TO DEVELOP WORK EVALUATION AND WORK TRAINING TECHNIQUES DESIGNED TO FACILITATE THE ENTRY OF MILDLY MENTALLY RETARDED INTO SERVICE OCCUPATIONS."

B. The project is being carried through with the support of Vocational Rehabilitation Administration of the United States Department of Health, Education and Welfare as RD-1588 - P 65.

C. The grantee organization is the Institute for the Crippled and Disabled of New York City (ICD).

D. The duration of the planning grant is one year. This report represents total activities and accomplishments for the entire year of the planning grant.

E. The formal starting date of the planning grant was September 1, 1964.

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Project Director.

II. Purpose

The overall objective of this research is the development of a system of vocational evaluation and training which is aimed to help persons with mild mental retardation enter certain service occupations. Specifically, it is desired to:

(1) Extend the TOWER SYSTEM of work evaluation to include those work areas which both theory and practice indicate as the most stable job placements for the mentally retarded. These occupations include such less skilled and more auxiliary tasks as those involved in the following work areas:

a. food handling and cafeteria work;
b. porter and building maintenance;
c. messenger (inside and outside);
d. material handling, shipping and receiving;
e. laundry work;
f. hospital aide;
g. other similar areas.

(2) Establishment of suitable supervised training programs in both commercial and non-profit facilities.

It was proposed that this project take place in two phases: Phase I (a one-year Planning Grant), and Phase II (a three-year Test Development Grant). The initial proposal was for support of Phase I. The Planning Phase was to provide the basis for support of Phase II.

During Phase I, the following preparatory procedures were to be accomplished:

1. Carry through an analysis of the detailed work requirements of the desired kinds of job placements, starting with a survey of what has already been done in other centers;

2. Explore possible work samples and the kinds of evaluation techniques which are required to tap potential, aptitudes and interest in the suggested work areas;

3. Develop plans for the carrying out of suitable training programs in the suggested work areas; the objective would be to explore the possibility of securing the cooperation of hospitals, and other non-profit institutions and commercial firms for the carrying on of work-training programs in these facilities, with supervision to be supplied by the project staff;

4. Work out the specific requirements of Phase II of this program; it was anticipated that Phase II will involve the a. actual development of the required work samples; b. the procedures of evaluation and training; c. as well as the pilot testing needed to demonstrate the efficacy of these procedures.

III. Justification of Project

Examination of current reports of the vocational rehabilitation services being offered to the mentally retarded indicates that the core services offered are typically situated in sheltered workshops (e.g. AHRC, Goodwill Industries, the various programs of the Jewish Vocational Services, etc.). While these programs have made a notable contribution to our understanding of the work problems of the mentally retarded, it should be noted that the basic work experience offered by these workships is bench assembly. On the other hand, where successful job placements are reported by these service projects, the placements are not made in factory assembly (where productivity standards are typically too high for this client category), but rather in what can be described as the auxiliary "helper" occupations, e.g., messenger, trucker's helper, busboy, kitchen helper, hospital aide, receiving platform helper, stock helper, etc We are thus confronted with something of an apparent inconsistency, in which the primary work training being offered to the mentally retarded client is not clearly focused on the job he will fill once he enters the unprotected labor market.

The current sheltered workshop programs attempt to resolve this inconsistency in two ways. First, they put forward the quite legitimate claim that the primary need of most of these clients is the acquisition of appropriate work habits and work behavior, in which these programs offer excellent training, regardless of the particular tasks the client is asked to perform. Second, the more advanced programs, such as AHRC, include programs which give the client some supervised experience in various "non-productive" activities, such as

messenger work, food handling and preparation, material handling, porter work, etc. However, these activities are not the center of attention in the typical sheltered workshop program, and appear to be less well-developed than the procedures which focus on productive operations. It may be questioned whether anyone has carried through a scientific analysis of the components involved in the work of a messenger, developed a step-wise and standardized series of evaluative tasks related to these components, to be followed by systematic training in each of these component processes.

This Institute (ICD) has not only pioneered in the development of work sample techniques as applied to the vocationally handicapped (the TOWER SYSTEM), but is a recognized center for the training of potential worker evaluators. Since 1957, under VRA Grant #146 - T, over 130 persons from all sections of the United States have been trained in the Tower Work Sample approach to evaluation of the work potentials of the vocationally handicapped. Within this group, we have noted an increasing number of trainees whose caseloads include mentally retarded clients. Ten of these TOWER trained evaluators deal <u>primarily</u> with mental retardation in state schools, private and public schools, and rehabilitation facilities. Another 26 former trainees have mentally retarded clients within their general rehabilitation caseloads, in settings which are scattered throughout the main geographic divisions of the country. It has been noted that there have been many requests made to ICD for Problem Clinics on the issue of evaluating the work potential of the mentally retarded client. It is recognized that the TOWER SYSTEM, in its present form, is aimed at a higher skill level than is suitable for most mentally retarded persons, and the Institute has had a number of queries which suggest a growing need to extend TOWER so that it will better serve the needs of this important client category.

We are proposing the extension of the TOWER approach to the requirements of certain service occupations. It is likely that the proposed extension will be useful not only for the mentally retarded per se, but also for a growing group of clients who have other disabilities as well. The increasingly rapid development of automation and mechanization is eliminating many jobs which were primary placement resources for rehabilitees of many types. The resulting high levels of productivity, and the general rise in the American standard of living are also bringing about a long-term secular shift from the manufacturing, to the service industries. It is logical to infer that the occupations associated with personal service and human welfare will provide many more future occupational opportunities than the kinds of work associated with manufacturing. Not only will this expand potential employment for the mentally retarded if properly evaluated and trained, but for other categories of the vocationally handicapped, as well.

IV. METHODS OF PROCEDURE

A. Research Reading

As with any disability group, the scope of inherent problems are many and varied. This is no less true with retarded and perhaps in some respects even more so. Considerable material was reviewed to ascertain the scope of (a) vocational problems inherent in the mentally retarded, (b) psychological, sociological and vocational determinants of the vocational feasibility of the mentally retarded. A bibliography of books and papers from medical, psychological and sociological sources that have greatest pertinence to the vocational aims of the proposed research may be found at the end of this report. Perhaps one of the most poignant guides to programing needs and consideration for the mentally retarded is an article by Ralph A. Peckham, in the American Journal of Mental Deficiency, 1951-52. 56. 448-453. This article provides an outline of "Problems in Job Adjustment of Mentally Retarded." In addition to pointing out the problems, there are also suggested solutions to certain categories of problems, as well as an analytical breakdown of frequency of the problems, etc. This material also provided a good insight into the retardate's possible functional limitations, which would need evaluations. Thus, included as part of the evaluation, it would provide an awareness of the retardate's actual limits and permit amelioration of these deficiencies where the client showed a capacity for it.

Another, and no less significant contribution to program development for mentally retarded is the "Guide to Jobs for the Mentally Retarded" by Peterson and Jones, American Institute for Research, Pittsburgh, Pa., 1964. This is a research project study which has produced a manual of training procedures and offers an excellent guide to vocational program structuring.

it provides a breakdown of job activities in job classes and also in specific job titles as listed in D.O.T.

The official definition of the American Association on Mental Deficiency requires that a suspicion of mental retardation be established on the basis of measured intelligence and confirmed by a clinical judgment as to the individual's actual adaptive behavior. At the University of Wisconsin conference on the "Vocational Rehabilitation of the Mentally Retarded", the group designated as mildly retarded is "comprised of those who, with proper preparation, can be fully capable of independent living in the community and gainful competitive employment. They require supervision and guidance under conditions of unusual social or economic distress. The moderately impaired are those retardates capable of maintaining themselves in the community and of performing adequately in unskilled work but who need some continuing supervision and assistance in adjusting to even the mild social and economic stresses in their lives." (1) In terms of psychometrics, the Guide for Selective Placement of Handicapped Persons states that "mild refers to vocational impairment, as would be expected with I.Q.s of approximately 75-80; moderate for impairment requiring special training and guidance as would be expected with I.Q.s of about 50-70." (2) For the purposes of this study, we shall use the designation of the American Association of Mental Deficiency wherein mild retardation is considered to comprise those individuals having an I.Q. between 50 - 79. (3)

B. Surveys

1. Facilities for the Mentally Retarded

A survey letter was formulated to obtain specific information relative to scope and content of current operational procedures, from facilities

that provide services for the mentally retarded, including sheltered workshops. (Exhibit A). Its purpose was to determine not only the program content but also to find research studies being applied and to make an analysis of their application in various settings.

We received a return of only 24% from the original 225 letters mailed out. Many replies, however,were accompanied by research or demonstration project reports. These reports, even though limited in number, had parallel goals to this project, but showed little parallel to the approach or techniques which are advocated in this project. A copy of the survey letter (Exhibit A) with a summary of the results (Exhibit B) and a list of specific project reports (Exhibit C). In our opinion these were beneficial in the planning of our proposed program.

2. Commercial Facilities

It is not only impractical but impossible to develop any measuring instrument for determining vocational potential without knowing what is involved in a job situation. Therefore, we initiated a survey of selected facilities outside of the Institute for this reason, as well as to determine what specific job classes in the service level of occupations were most needed, and in which mentally retarded might be evaluated and trained.

Since we felt it essential to include a period of on-the-job experience in an outside situation, we also solicited a reaction to future participation by these outside facilities. During the formation of a survey letter, it was realized that to have necessary information would require no less than a personal contact. As a result, the survey letter became a letter of introduction stating our interest and requesting an appointment to discuss the project in more detail and elicit their help on our project (Exhibit D).

With our concern for service area situations, contact letters were sent to a variety of concerns employing both a variety of service jobs as well as providing possible outlet for a number of placement. Letters were sent to the following types of facilities; Hotels (chains), Hospitals, Restaurants (chains), and commercial cleaning firms. Responses came primarily from hospitals. Therefore appointments for further discussions were made with six hospitals.

Some replies by phone from other types of concerns verbalized negative interest due to existing participation commitments with other programs, some indications of fear in dealing with the retarded, lack of interest in rehabilitation and fear of being committed to extensive involvement beyond their immediate concern. Some replies (verbal) indicated they did not want to know about the project at all, and refused even to listen to a brief explanation on the phone.

Five of the six hospitals provided extensive assistance by giving information on jobs, as well as by indicating that they would probably be able to participate as an on-the-job training experience setting.

<u>List of Hospital Facilities Willing to Cooperate with the Project</u>

New York University Hospital
568 First Avenue
New York N Y

Misericordia Hospital
600 East 233rd Street
Bronx, New York

Roosevelt Hospital
9th Avenue at 59th Street
New York N Y

St. Francis Hospital
525 East 142nd Street
Bronx, New York

Veterans Administration Hospital
New York, New York

All five facilities supplied photostatic copies of job descriptions from their files. In addition to the specific job descriptions given, request was made and granted for further discussion of detailed job activities with department personnel at a later date after we reviewed the job descriptions. A list of jobs for which we obtained specific factors may be found in the appendix (Exhibit E).

We found that most of the job descriptions were quite general and, even though they might be adequate for the usual employment requirement, they were insufficient to permit development of the necessary quality-sampling of work activities that we needed to evaluate the vocational potential of the mentally retarded. We then honored the permission granted to spend time with the department personnel in the service areas, adding greatly to the previous information. Cooperation was courteously given and when permission was requested to return for a review of our formulated work activities, this too was freely given. After formulating the work activities into a usable form, even with knowledge of proper structuring, it is imperative that it be checked by personnel in the field who are actively engaged in the work to assure adequate contact and factual procedures. These procedures were followed in all the concerns visited.

C. Job Information Summary

In order to gain the greatest significance from the specific job information, all job specifications were assembled and compiled into analysis charts. Chart number I shows the frequency of a particular activity incorporated in all classes of service jobs (Exhibit F). Chart Number 2 shows prevalence of basic job factors as they relate to various service jobs (Exhibit G). From all material collected, it appeared that there might be a sufficient number of these job activities to develop a preliminary evaluation procedure. If this were so, we would be able to eliminate extensive evaluation of work activities in a number of service level job classes, and to concentrate only on those

job areas in which the client showed the greatest promise. This might also be one answer to the contention that the retarded lack specific training in the so-called incidental job activities, and that this may be a major reason for their inability to hold on to a job. We are referring to those aspects of a job which a normal population is assumed to be capable of doing already and has had sufficient opportunity to acquire the ability on their own. Such an activity might be as simple a thing as proper answering of the telephone or properly transmitting important messages. The retarded must, however, be trained in these facets, even though ghey may not be listed as requirements for a job. Therefore it is proposed that these Elementary Job Activities become basic to the evaluation and training of the retarded person for any job situation.

V. PROGRAM DEVELOPMENT

At this time it was felt that sufficient information had been collected to make a tentative program outline for a future Demonstration Project. Based on the resulting analysis for the collection of job specifications from various facilities, and those contained in "Guide for Jobs for Mentally Retarded", and with realization of the importance of basic job factors to employability, we compiled the following tentative outline for evaluation procedures of basic job factors.

A. Evaluation of Basic Job Factors

1. Verbal Ability:
   - a. Telephone
   - b. Tape Recorder
   - c. Direct conversation
   - d. Verbal description
2. Numerical Ability
   - a. Counting
   - b. Filing numerically
   - c. Weighing
   - d. Measuring
3. Reading Ability:
   - a. Safety signs
   - b. Direction signs
   - c. Bldg. directory
   - d. Written directions
   - e. Telephone Directory
   - f. Filing alphabetically
   - g. Mail sorting
4. Writing Ability:
   - a. Printing
   - b. Write directions
   - c. Names & Addresses
   - d. Filling out forms
5. Travel Ability:
   - a. Bus
   - b. Subway
   - c. Walking
6. Basic Job Procedures:
   - a. Packing
   - b. Wrapping
   - c. Tying
   - d. Sorting:
     1. Physical
     2. Color
     3. Size
     4. Weight
   - e. Locating by:
     1. Number
     2. Word
     3. Symbol
   - f. Using:
     1. Dials
     2. Gauges

Related Work Factors

7. Social Skills:

    a. Self-Concept-Communication, ask for assistance, questions
    b. Self expression
    c. Sociability
    d. Work Independence
    e. Appearance
    f. Teamwork
    g. Adaptation to Work Environment

8. Time Factors:

    a. Pace
    b. Attendance
    c. Simultaneity
    d. Timing
    e. Transition to new job situation

9. Performance Skills:

    a. Accuracy
    b. Dexterity
    c. Concentration
    d. Choice
    e. Direction
    f. Memory
    g. Transfer of Training

10. Work Attitude:

    a. Attitude toward work
    b. Motivation toward work
    c. Response to instructions
    d. Interest
    e. Response to pressure
    f. Task approach
    g. Reaction to unexpected job assignments

11. Tolerance:

    a. Repetitiveness
    b. Perseverance
    c. Stamina
    d. Employment tolerance

B. Evaluation of Service Job Activities

Initially, consideration was given to the exploration and development of work activities for five service areas. Due to the time necessary to properly structure the work activities, the number of areas were reduced to the three areas having the greatest placement potential. The following tentative outline of these areas, and specific job activities, illustrate both design and possible content of the sampling of work activities for the specific job area evaluation. It will be noted that the enumerated activities could be expanded to yield a general basis for evaluation, as illustrated under Food Handling-Cleaning, General.

1. Porter - Bldg. Maintenance

    a. Gen. Bldg.: dusting, cleaning & polishing
    b. Elevator operation
    c. Material handling (receiving & stocking supplies)
    d. Furniture & Equipment moving
    e. Light bulb & supply replacement
    f. Trash collection and removal.

2. Food Handling:
    a. Cleaning, General
        1. Sweeping
        2. Mopping
        3. Dusting
        4. Hand washing of walls and equipment
        5. Polishing
    b. Serving
    c. Table setting
    d. Stockroom; sorting
    e. Floor cleaning and scrubbing

3. Hospital Service Workers:

    a. Aides

        1. Room cleaning & sterilizing
        2. Set-up room cleaning carts- with replacement linens, etc.
        3. Scrubbing
        4. Laboratory cleaning
        5. Making beds
        6. Furniture moving
        7. Patient handling

Since the formalization of the Tower Training Program at ICD, many evaluators from all over the United States and some foreign countries have taken training in the TOWER technique of developing work samples. During these training courses, some of these trainees have written up initial work sample procedures. These have not been developed to a point of completion. From this collection of initial procedures, some have been selected to be used as a basis for developing the necessary sampling of work activities for the service job area. A list of these, along with check list acquired from other rehabilitation facilities, which might be used as a basis for developing the necessary sampling of work activities for the service job area. A list of these, along with check list acquired from other rehabilitation facilities, which might be used as a basic point for activities development, may be found in the appendix (Exhibit H).

C. Development of Inter-Related Rating Scale

Preliminary to the development of actual sampling of work activities, there was an obvious need to develop a means of rating performance on the work activities. During the compilation and analysis of job information, the Principal Investigator developed the concept of a series of preliminary screening work activities dealing with the employability factors basic to the retarded. It is felt that the resulting system has excellent potential application, not only to this project but to the development of similar evaluation procedures in other settings.

The rating system is comprised of a series of job activity profiles illustrating the minimum requirements for a job situation. There are two sets of rating profiles (Exhibit I, J). The first is a series of profiles illustrating the minimum level of ability on basic employability factors as they relate to the service jobs with which we are concerned. The numerical value is

established on the basis of two general considerations:(1) The qualitative merits of the job using a particular type of tool or equipment, and (2) The setting in which this specific activity will be used. The score for a particular factor or a particular job would be determined by an analysis of that particular factor as it is performed in a regular employment setting.

The client's scores would be based on the same scale, 0-100, i.e., each activity in each area would have a rating from 0-100. When the client's scores are recorded for each factor they are plotted on the specific job profiles, thereby indicating the job for which he has the highest potential. This procedure is used on the General Employability factors first, which would eliminate extensive testing in areas in which the client showed no potential. When the specific job area evaluation is completed, both the employability ratings and the specific job ratings are recorded on the summary rating form. This allows a comparison of the job area and specific jobs having the highest ratings, upon which to make recommendations.

D. Intermediate Training

Training must not only provide supervision for developing job skills but also provide an accompanying opportunity to experience the pressures, interruptions, and demands of an actual job situation.

In the development of training programs, it was felt that incorporating these job demands into an Intermediate Training Period would serve to eliminate confusion and unawareness of these factors in an on-the-job experience setting. It was determined that the regular job setting of ICD could provide these factors.

Areas at ICD which would be used to serve the training program needs are: 1. Cafeteria (food handling), 2. Maintenance Dept. (Porter and Building Maintenance), 3. Infirmary, O.T. and P.T. Depts., (Hospital Service Workers).

Training in these areas would not be designed to train for a specific job title within a job class, but to give training in a job class which would allow the client to have a broader background to apply to a specific job title. As an example: in the area of Porter and Building Maintenance, there may be a broad number of job titles in which many activities overlap. It would be much more advantageous to the client to be able to comply with job title variations, thus giving him greater job security.

Training Curriculum Outline

The following list of activities for the training areas is tentative. It will be noted that various job titles would be covered by these training programs.

1. JANITORIAL & BUILDING MAINTENANCE WORKER (HOUSEMAN, HOUSECLEANER, WALL WASHER, PORTER, ETC.) ----------12 Weeks.

(1) General Cleaning — 2 Weeks
- Sweep, clean dust
- Empty trash
- Burn trash
- Empty and clean ashtrays
- Sort shelve supplies
- Polishing metalwork.

(2) Heavy Cleaning — 4 weeks
- Scrubbing floors
- Burn trash
- Wash windows
- Wash walls

(3) Use of machines — 2 weeks
- Wax floors
- Minor furniture repairs

(4) Elevator Operation — 2 weeks
- Passenger
- Freight

(5) Overall application of above duties with regard to regular agency requests — 2 weeks

II. FOOD SERVICE - FOOD HANDLING (HELPER, DINING ROOM, DISHWASHER HOSPITAL HELPER, KITCHEN HELPER, HOSPITAL FOOD SERVICE)------12 weeks.

1. Bussing — 2 weeks.
   - Clean dishes from table, cart, trays
   - Lift and carry tray with food, dishes
   - Scrape dishes, trays, pans
   - Replenish table supplies, salt, napkins, silver
   - Mop floors
   - Clean tables.

2. Dishwashing — 2 weeks
   - Use of hand, dishwashing apparatus
   - Scrubbing utensils and pots
   - Scour work tables, meat blocks, counter

3. Simple food handling — 2 weeks
   - Preparing simple foods, coffee
   - Wrap food for carryouts
   - Replenish beverages, rolls, serve relishes
   - Carry, serve food outside dining room.

4. Advanced food handling — 6 weeks
   - Sandwish preparation for individual orders
   - Portion out food to plates
   - Preparation of salads
   - Cashbox

III. HOSPITAL SERVICE WORKERS (ORDERLY, MED. SERV., WAITER HOSPITAL, ETC. ----------12 weeks.

1. General Cleaning — 2 weeks
   - Fold, sort, count, distribute linens
   - Empty bed pans
   - Clean lavatories
   - Fill water pitchers
   - Carry food trays

Heavy Cleaning — 2 weeks
   - Change and make beds
   - Mop floors

Patient Care — 6 weeks
   - Lift and assist patients on and off beds
   - Bathe patients
   - Dress and undress patients
   - Feed patients
   - Give alcohol rub or massage

General practice of varied assignments — 2 weeks

Supervisory personnel for training will be discussed in the section covering all project personnel. All clients would be afforded an opportunity to explore the training work setting during the evaluation period. It has often been questioned as to how much effect exposure to a job setting has on a client's efforts during the evaluation period. This is a question in which we hope to gain some insight.

E. On-The-Job Experience & Placement

No person, regardless of prior experience of formal training, would be expected to move into a new job situation without some degree of orientation to that particular setting. It is with this in mind that the program proposal recommended using an outside (Outside ICD) facility in which the client would experience the need for adapting learned skills and information to an actual job setting. In this job setting the client would work as a regular employee under that facility's supervisory personnel.

Project staff would be available, however, to handle initial orientation and any problems which might arise during this period of the client's program. As was mentioned earlier, of the six hospitals surveyed, five indicated a tentative willingness to cooperate with the project. Many questions were raised by hospital personnel. Among these questions was: who has the ultimate responsibility for the client? It was explained that the client was still under our responsibility. During this period the client would be receiving a training wage for this work. This would be a slight increase over the fee paid to the client during his Intermediate Training period. It was also made clear that in the event that an outside facility was desirous of permanently hiring a client during this period, they might do so only after a minimum of three months in that phase of the client's program.

Placement would be handled by a project staff counselor with the assistance of the regular Institute's counseling and placement staff. Field visits, telephone solicitations and mail promotions would be undertaken by the project placement counselor.

F. Recommendations for Demonstration Project

1. Project Staff

During the current year of this planning project the staff has consisted of: the Principal Investigator and the project secretary, plus ICD executive and consultative staff.

Recommendation for staff for a Demonstration Proposal consist of, in addition to present personnel:

2 Evaluators

2 Training Supervisors

1 Field Supervisor

1 Counselor

2. Client Source

We plan to work with 30 clients during this three year project. The population of choice for a Demonstration Project that followed this Planning Project could come from the Division of Vocational Rehabilitation. Originally it was felt that clients might be selected from referrals by various agencies. However, two factors determined the basis for requesting the use of D.V.R. as the only source of referrals. First, using a single agency, which has extensive rolls of potential population already screened and classified, would require less time in screening. Second, there would be fewer problems in orienting the staff of a single agency to research needs.

Therefore a meeting was arranged with the State DVR personnel. Criteria for accepting clients into a Demonstration Project were revised by mutual agreement at the ICD-DVR meeting of April 8, 1965:

1. I.Q. rating between 50-79 on WAIS psychological battery.
2. Males and females, 16-35 years of age.
3. Literacy to a minimum of 2nd grade.
4. No significant physical and/or emotional problems which would interfere with the employment; no hospitalization in a mental institution during the past 3 years.
5. Independent ADL and travel necessary for competitive employment, or capable of learning some prior to entering vocational training phase of the project.
6. Adequate social and emotional maturity for evaluation and training in a group setting within a vocational rehabilitation center.
7. No physical impairment which might preclude adequate functioning in a service area occupation, such as restrictive losses of hearing and vision or inability to communicate.

3. Recommended Client Program Schedule:

Time	Evaluation	Intermediate Training	On-The-Job Experience
3 Month	10 Clients		
3 Month	10 Clients	10 Clients	
3 Month		10 Clients	10 Clients
3 Month			10 Clients
3 Month	Follow-Up and Training Program Changes		
3 Month	10 Clients		
3 Month		10 Clients	
3 Month			10 Clients
3 Month	Work Sample Test Development and		
3 Month		Follow - Up	
4 Month	Preparation of Manual of Procedures		

Hours for Evaluation will be 9-3 daily; hours for Intermediate Training will be 9-4 daily; hours for On-The-Job Training in an outside facility will be 9-5 daily. Clients will not be paid during the Evaluation. However, they might receive 28¢ an hour during the Intermediate Training at ICD and 50¢ an hour during their On-The-Job Training at community facility.

The above arrangement allows time necessary for feed back from initial clients processed through the on-the-job experience. Time lapses would be used to analyze data collected during procedure for making any necessary changes in program content or structure prior to accepting last group of clients.

4. Outline for Proposed Demonstration Project

This outline is incorporated at this point to illustrate the overall program content and structural procedure toward which the Planning Project aimed. (Referral Source: DVR)

I. Intake

- A. Counselor Interview
- B. Medical Examination
- C. Social Interview
- D. Psychological Review

II. Specialist Examination

- A. Social Service
- B. Psychological

III. Evaluation

- A. Employability Evaluation (Evaluation Unit at ICD)
- B. Job Area Evaluation (in Evaluation Unit at ICD and regular job situation at ICD).

IV. Intermediate Training at ICD

- A. Food Handling
- B. Porter, Building Maintenance
- C. Hospital Service Workers

V. On-The-Job training Experience

- A. Hospital

VI. Placement

- A. Hospital
- B. Hotels
- C. Restaurants
- D. Etc.

EXHIBIT A

Institute for the Crippled and Disabled
400 First Avenue, New York, N.Y.

Dear Sir:

I am currently engaged in the planning stage of a V.R.A. sponsored research program relative to the vocational rehabilitation of the mentally retarded.

It would be most helpful if you could provide me with the following information:

1. The number of Retarded, as compared to other disability types, in your total case load. Also including the I.Q. range and how it is determined.
2. Training programs; which ones, and how they are conducted.
3. An outline of your evaluation program, re content, and administration procedures.
4. Areas of placement (job types)
5. Procedures and/or techniques used in placement.
6. Any related services which you feel are pertinent to or necessary for adequate development of vocational potential, such as social or group therapy, etc.

The above information will aid to eliminate outmoded procedures, while simultaneously developing and standardizing new or unique ones.

Due to the limited time for planning and the need to obtain the above information from various facilities, it is necessary to ask your co-operation in returning this information as soon as possible.

Hoping to hear from you soon, I remain,

Yours truly,

David I. Hall
Chief Investigator
Special Research
I.C.D.

EXHIBIT B

SUMMARY: SURVEY OF FACILITIES SERVING RETARDED

NO. FACILITIES REPLYING 54 NO REQUESTS MAILED OUT 224
NO. OF STATES REPRESENTED 23
STATES RANKING IN NO. OF REPLIES

1. New York
2. California
3. Louisiana, Florida, New Jersey

TOTAL NUMBER OF CLIENTS SERVED (YEAR) 3,475

RANGE IN NO. OF CLIENTS SERVED: From 12 to 600 (38 of 54 Replying)

AVERAGE NO. OF CLIENTS SERVED 93.92

SOURCE OF REFERRAL IN RANKING ORDER

1. D.V.R.
2. Local Day Care Center
3. St. Sch. & Hosp.

I.Q. RANGE 0 to 123

AVERAGE I.Q. OF ALL CLIENTS 71 (29 Facilities)

SERVICES	NO. OF FACILITIES REPLYING	PERCENTAGE OF TOTAL FACILITIES REPLYING
EVALUATION	38	70.3%
COUNSELING & GUIDANCE	30	55.5%
P.A.T.	25	46.2%
SO. ADJ. SERVICE	17	31.4%
PERM. WORKSHOP	37	68.5%
TRAINING:		
Domestic	19	35.1%
Commercial Service	24	44.4%
Production Work	28	51.8%
Semi-Skilled	22	40.7%
Skilled	4	7.4%
PLACEMENT	43	79.6%

EXHIBIT C

SPECIFIC PROJECT REPORTS FROM REHABILITATION FACILITIES FOR THE MENTALLY RETARDED

1. The Atlanta Occupational Center for Mentally Retarded (The Bobby Dodd Workshop), Progress Report RD 531, Date Reported: January, 1964. Add: 1100 Sylvan Road, S.W. Atlanta, Georgia. Sponsored by The Atlanta Association for Retarded Children, Inc. In cooperation with the Office of Vocational Rehabilitation Department of Health, Education and Welfare, Washington, D.C. "The Project is designed to demonstrate that mentally retarded young adults who were previously considered unemployable could attain, through provision of vocational rehabilitation services, vocational goals commensurate with their ability, and assume appropriate and satisfying roles in community living."

2. A Cooperative Vocational Pattern for In-School Mentally Retarded Youth (Training and Work Center for the Handicapped) Project No. RD-1189, Date Reported: Sept.1, 1963 - August 31, 1964. Add: 29 South Sixth St., Newark 10, N.J. Sponsored by: Occupational Center of Essex County, Inc.
"The purpose of the project is to develop and demonstrate the techniques of meeting the vocational rehabilitation needs of mentally retarded youth who are completing their last year of special education in a public school system, a state vocational rehabilitation agency and community workshop."

3. Placement of the Cerebral Palsied and Others Through Evaluation and Training. A project of the Memphis Goodwill Industries. VRA Project 490, Add: 94 No. Second St., Memphis, Tenn. Sponsored in part by a demonstration grant, from the Vocational Rehabilitation Administration, Dept. of Health, Education and Welfare, Washington, D.C. 20025. "The project was designed to develop means for helping the severely handicapped to become integrated into the working life of the community whenever possible. The purpose was also to establish a format by which any other community could do the same thing, if the Memphis effort were considered successful."

4. Work-Citizenship Preparation Services for Mentally Retarded Adults. Selected Demonstration project #278. Date of Report: Dec. 1958 - November 30, 1962. Add: Goodwill Industries of Greater Kansas City, 1817 Campbell, Kansas City, Mo. Sponsored by: The Vocational Rehabilitation Administration, U. S. Dept. of Health, Education and Welfare. The Missouri Section for Vocational Rehabilitation. The Kansas Vocational Rehabilitation Service. "A handbook on organization and operation of a specialized habilitation program in a multiple handicap workshop. A discussion of essential work preparation services. A discussion of essential citizenship preparation services."

5. Development of Occupational Evaluation and Training Center for the Mentally Retarded.

Project #308. Date reported: September 1963. Add: Tacoma Goodwill Industries Rehabilitation Center, 2536 Tacoma Avenue South, Tacoma, Washington. Sponsored by: Vocational Rehabilitation Administration, U. S. Dept. of Health, Education and Welfare, Washington, D. C. "The project contained in this report has enabled this agency to develop a program and extend services to a group of citizens within the community who have been in acute need of rehabilitation measures."

Exhibit D

Institute for the Crippled and Disabled
400 First Avenue, New York, N.Y.

Dear Sir:

We are currently engaged in the planning stage of a Training and Research Program for the Mentally Retarded. The purpose of the program is the development of an extensive vocational rehabilitation program consisting of:

1. Evaluation of vocational skills and potential of high level retarded clients.

2. Training in an appropriate service area, and, on-the-job practical experience.

At this time we are requesting your assistance and guidance in acquiring specific information on service area jobs, as well as determining the practicability of using organizations such as yours for an on-the-job practical experience, which would not begin for approximately one year. Your extensive experience could currently help us determine:

1. Those service areas for which there is an industrial need, and

2. The actual nature of these job areas upon which to base future evaluation and training programs for the Mentally Retarded and other handicapped groups.

Being aware of the complexity of your operation, I feel you could provide considerable insight into the many facets of this undertaking. I would appreciate an opportunity, at your earliest convenience, to visit your facility and discuss this program with you or a representative of your organization.

Sincerely,

David L. Hall
Chief Investigator
Special Research.

Exhibit E

Job Information From Hospitals

New York University Hospital

1. Tray Assembler
2. Porter
3. Elevator operator
4. Cafeteria Man/Woman
5. Folder/Sorter
6. Dishwasher

St. Francis Hospital

1. Orderly
2. Counter Girl
3. Diet Aide
4. Porter (housekeeping)
5. Head Dishwasher
6. Dishwasher (Dietary Dept.)
7. Nursing Aide

Misericordia Hospital

1. Pot Washer
2. Porter, Dietary
3. Dishwasher
4. Counter Server
5. Groundsman
6. Incinerator Man
7. Attendant
8. Attendant, Central Supply
9. Nurse's Aide

Guide to Jobs for the Mentally Retarded

1. Stock Boy or Girl - 5&10 Cent Store
2. Messenger, general office
3. Wrapper or Packer, mail order house
4. Day Worker, housecleaning
5. Helper, Dining room
6. Dishwasher, restaurant, hospital
7. Helper, restaurant clean-up
8. Helper, Hospital food service
9. Helper, building cleaning and maintenance.
10. Helper, building housekeeping
11. Building Porter
12. Assistant, Greenhouse
13. Helper, Park and Grounds Maintenance
14. Delivery Boy, local deliveries

JOB SPECIFICATIONS

Acquired from the Following Facilities

Roosevelt Hospital

1. Maid
2. Cook's Helper
3. Nurse's Aide (Auxiliary Nursing Dept.)
4. Float Maid
5. Checkout Aides
6. Basement Porter
7. Evening Porter (Operation Room)
8. Maid - Night
9. Porters
10. Early Porters (5 A.M. shift)
11. Wall Washer
12. Porter (Garbage Removal)
13. Nurse's Aide (Cystoscopy Dept.)
14. Orderly - Recovery Room
15. Nursing Aide - Evening, Day.
16. Messenger
17. Early Maid
18. Special Area Porters
19. Porter (Operating Room)
20. Dishwashers
21. Utility Men
22. Food Service Aide I (Eve.)
23. Cafeteria Servers
24. Waitress (Hospitality Shop)
25. Orderly (Auxiliary Nursing)
26. Nurse's Aide (Cystoscopy)
27. Sorter (Laundry)
28. Linen Distributor
29. Messenger File Clerk
30. Feeder - Folders
31. Utility Girl
32. Uniform Girl.

Veterans Administration Hospital

1. Food Service and Food Production Section
2. Warehouseman - Laborer (Supply Division)
3. Mail Clerk
4. Housekeeping Aide
5. Housekeeping Aide (Rubbish Removal Unit)
6. Housekeeping Aide (General Cleaning Unit)
7. Gardner - Laborer
8. Housekeeping Aide (Soiled Linen Unit)
9. Central Service Assistant

CHART # 1

FREQUENCY CHART OF COMMON JOB ACTIVITIES IN SERVICE AREA JOBS

From Job Specifications of Public Facilities

COMMON JOB ACTIVITIES	Food Tray Assembler	Counter Girl-Man	Bus Boy	Nurse Aide	Incenerator Man	Messenger	Porter	Hosp. Checkout Aide	Cook's Helper	Maid	Grounds Maintenance	Warehouseman	Hosp. Housekeeping Aide	Food Serv.Caffe.Aide	Food Service Aide	Hosp. Utility Man	Dishwasher	Orderly	Domestic Worker	Kitchen Helper	Flatwork Ironer	Floor Polisher	Clothesroom Worker	Handy Man	Linen Distributor	Uniform Girl	Wall Washer	Laundry Sorter	Laundry Flatwrk.Shaker	Mail Clerk	Elevator Operator	Hosp. Diet Aide	Laundry Tumbler Operat.	TOTALS
1. Asst. Food Prep.	X	X							X					X	X																			5
2. Dust, Mop , Wash, Wax			X	X			X	X		X		X	X			X			X	X		X												11
3. Arrange Furniture						X	X			X	X		X						X								X								7
4. Collect Garbage	X		X		X		X	X		X	X		X		X	X	X	X	X	X				X											15
5. Polish			X				X			X		X	X			X			X	X															6
6. Sterilize Supplies				X														X																	2
7. Set Tables		X	X											X	X																				4
8. Fill Condiment Cont.		X	X						X					X						X															5
9. Set-up Trays & Carry	X		X	X										X	X			X		X												X			8
10. Snow Removal							X				X													X											3
11. Load & Unload Trucks							X				X	X	X		X	X		X		X					X								X		10
12. Pack & Ship Supplies						X	X				X	X				X										X									6
13. Sweep Floors			X	X			X	X		X		X				X	X	X				X													10
14. Vaccum Rugs							X			X			X																						3
15. Sort & Separate				X	X	X				X			X		X						X					X		X	X	X			X		12
16. Serve Food	X	X							X					X	X					X															6
17. Assemble Items	X	X							X			X		X	X	X				X					X								X		10
18. Make Beds				X					X				X					X	X																5
19. Wash Dishes		X	X						X							X	X		X	X															7
20. Replenish Supplies			X	X					X				X	X	X			X		X													X		9
21. Clean,Streighten Supp.				X			X						X		X			X	X	X							X						X		9
22. Distribute Supplies						X			X	X	X			X				X		X						X									8
23. Mow Lawns							X				X													X												3
24. Issue Supplies							X			X		X													X	X										5
25. Clean Special Areas				X		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X				X		X			X	X			21
26. Defrost Refrigerator	X								X	X				X	X			X	X													X			8
27. Wash Walls																X		X									X								3

CHART # 2

EXHIBIT 6

FREQUENCY CHART: PREVELANCE OF BASIC JOB FACTORS
AS THEY RELATE TO VARIOUS SERVICE JOBS

	Stock Boy & Girl	Day Worker (house cleaning)	Building Porter	Delivery Boy	Messenger	Wrap & Package (Mail order house)	Helper, Hotel Din.Rm.	Helper, Rest. Cleanup	Helper, Hospital Clnup. (Kitchen)	Dishwasher, Restaurant Hospital	Dishwasher, Hotel	Helper, Bldg. Cleaning (maintenance)	Helper, Bldg. Housekeeping	Grounds Maintenance	Helper, Greenhouse
1. Simple Counting	X	X	X	X	X	X	X			X	X	X	X	X	
2. Reading	X	X	X	X	X	X	X	X	X	X	X	X	X	X	
3. Measure Weight	X		X		X	X						X		X	
4. Measure Length	X		X			X						X	X	X	
5. Write Simple Messages	X	X	X	X	X	X	X			X		X		X	
6. Use Telephone	X	X	X	X	X	X	X			X		X	X		
7. Arrange Alphabetically	X				X					X					
8. Tell Time	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
9. Tie Knots and Bows in String	X	X	X	X	X	X				X		X	X	X	X
10. Simple Sorting: color, size, weight	X	X		X	X	X	X		X	X	X	X	X	X	X
11. Simple Cleaning	X	X	X				X	X	X	X	X	X	X	X	X
12. Read: dials, guages, thermometer										X	X	X			
13. Identify by: number, word, symbol	X	X	X	X	X	X	X	X	X	X	X	X	X	X	
14. Use simple hand carpentry tools			X			X						X	BOY	X	X
15. Use Simple hand sewing equipment		X											GIRL		
16. Make Change (count money)				X	X										
17. Simple Carpentry			X									X	X	X	X
18. Simple Cooking		X					X		X						
19. Simple Sewing		X													
20. Simple Clerical Activities	X			X	X										

Exhibit H

Work Samples for Service Areas to be Developed

1. General Bldg. cleaning test - D. R. Ferrier (TOWER Trainee)
   Tests: #1 Gen. Cleaning test sweeping
   " #2 " " mopping
   " #3 " " machine buffing & self polishing wax
   " #4 " " dusting
   " #5 " " wall washing

2. Domestic Worker test - J. R. Allen (TOWER trainee)
   Tests: #1 Lifting, carrying, following directions
   #2 House cleaning
   #3 Tidying
   #4 Handling dishes
   #5 Clothes care
   #6 Carryover (retention of previous procedure test #4)
   The above test same application in all three areas for development.

3. Activities check list - Not structured test situations
   a. Porter Evaluation form - Max Dubrow, Sheltered Workshop
   b. Work check list for Janitor (Porter) & Housekeeping - W. Va. State D.V.R. Center

Nurse's Aide (Auxiliary) - Virginia S. Leitner (TOWER Trainee)
Test #1 Use of thermometer (using visual aide)
" #2 Taking a subject's temperature
" #3 Taking a subject's pulse
" #4 Feeding a helpless patient
" #5 Bed making

Nurse's Aide Test (Series II) - Williams, Nancy OTR (TOWER Trainee)
Test #1 Turning helpless patient in bed
" #2 Bed making with " " "
" #3 Dressing a patient
" #4 Use of wheel chair
" #5 Transfer of patient from bed to wheelchair

Laboratory Aide - F. Evelyn Marsh (TOWER Trainee)
Test #1 Housekeeping - cleaning: sinks, table, counters, shelves.
" #2 " - sweeping
" #3 Wash laboratory glassware (include test tubes, slides & coverslips)

Activities checklist - not structured test situations
Work checklist for Nurse's Aide & Orderly
W. Va. Voc. Rehab. Center (D.V.R.)

4. Cook's Helper - Al. Carlisle (TOWER Trainee)
   Test #1 - General cleaning (Porter Work) (Domestic Dish. Wash)
   " #2 - Peeling & cutting
   " #3 - Sandwich making
   " #4 - Use of Stove
   " #5 - Measuring units (for food)
   " #6 - Cooking from recipe

5. Activities Check List - Not structured test situations.
   a. Cafeteria Evaluation from - Max Dubrow - Sheleterd Workshop
   b. Work check list for kitchen helper and/or dishwasher
      (West Virg. State D.V.R. Center)

RATING SCALE FOR GENERAL EMPLOYABILITY FACTORS
AS THEY RELATE TO A SPECIFIC JOB

EXHIBIT I

CLIENT: John Doe

	FACTOR SCORES
1.	15
2.	20
3.	40
4.	30
5.	18
6.	22
7.	37
8.	52
9.	12
10.	9
11.	15
12.	20
13.	32
14.	41
15.	55
16.	64
17.	14
18.	6
19.	4
20.	43

JOB A

TRAINING			PLACE.	
NO	?	YES	?	YES
20	30	40	50	60
15	20	25	35	45
10	12	25	35	50
10	20	30	40	60
5	10	15	25	35
10	15	20	30	40
20	25	35	45	50
18	32	45	55	65
12	16	22	28	34
8	12	16	20	24
7	15	23	31	40
6	12	18	24	30
5	9	15	20	25
20	30	40	50	60
15	25	35	50	65
20	30	40	50	60
5	10	15	25	35
4	8	10	12	15
5	10	12	14	16
12	18	24	35	45

JOB B

TRAINING			PLACE.	
NO	?	YES	?	YES
10	12	15	18	21
5	10	20	30	40
10	20	30	40	50
15	30	45	60	75
5	15	25	35	45
7	9	12	18	24
10	15	20	35	45
20	40	60	80	100
2	6	8	12	15
4	8	10	12	14
5	10	15	20	25
6	12	18	24	32
20	30	50	70	90
10	25	35	45	55
20	40	60	75	90
30	40	50	60	70
4	8	12	16	20
5	10	15	25	30
2	4	6	8	12
15	25	35	45	60

JOB C

TRAINING			PLACE.	
NO	?	YES	?	YES
5	10	15	20	25
10	15	20	25	30
10	20	30	40	50
5	10	15	25	35
6	9	12	15	25
12	14	16	18	20
15	20	30	35	40
20	30	40	60	80
4	8	12	16	18
2	4	6	8	10
3	6	9	12	15
4	12	20	30	38
8	16	24	32	40
10	20	30	40	50
15	30	45	60	75
20	40	60	80	90
4	8	12	16	18
4	6	8	10	12
5	10	15	30	45
15	25	30	40	50

RATING SCALE FOR EVALUATION OF SPECIFIC JOB AREAS — EXHIBIT J

CLIENT: John Doe

	FACTOR SCORES
1.	12
2.	24
3.	9
4.	16
5.	20
6.	20
7.	16
8.	22
9.	34
10.	41
11.	21
12.	10
13.	14
14.	35
15.	8
16.	21
17.	15
18.	10
19.	10
20.	18

JOB A

TRAINING			PLACE.	
NO	?	YES	?	YES
1	2	3	4	5
5	10	15	20	25
2	4	6	8	10
4	8	12	16	20
3	5	7	9	12
5	10	20	30	35
2	3	7	10	14
10	15	25	35	45
15	35	45	60	75
10	20	30	40	50
6	12	18	24	36
8	16	24	32	40
6	8	12	14	18
5	7	9	11	15
3	6	12	24	48
2	8	16	24	35
5	10	20	25	35
10	25	40	60	80
4	8	16	32	40
9	15	21	28	35

JOB B

TRAINING			PLACE.	
NO	?	YES	?	YES
6	8	12	14	18
3	6	12	24	48
5	7	9	12	15
8	16	24	32	40
10	20	40	60	80
5	10	20	25	35
2	8	16	24	35
9	15	21	28	36
4	8	18	32	40
15	30	45	60	75
10	20	30	40	50
2	3	7	10	15
10	15	25	35	45
5	10	20	30	35
2	4	6	8	10
4	8	12	16	20
5	10	15	20	25
1	2	3	4	5
3	5	7	9	12
6	12	18	24	36

JOB C

TRAINING			PLACE.	
NO	?	YES	?	YES
10	20	40	60	80
15	30	45	60	75
2	4	6	8	10
6	12	18	24	36
8	16	24	32	40
4	8	16	32	40
5	10	20	30	35
3	5	7	9	12
5	7	9	12	15
9	15	21	28	35
10	15	25	35	45
1	2	3	4	5
3	6	12	24	48
2	8	16	25	35
2	3	7	10	15
5	10	15	20	25
6	8	12	15	18
5	10	20	25	35
10	20	30	40	50
4	8	12	16	20

EXHIBIT K

Summary Evaluation Rating

Client: John Doe

Date: _____

	EMPLOYABILITY FACTORS					JOB AREA EVALUATION				
	TRAINING			PLACEMENT		TRAINING			PLACEMENT	
	NO	?	YES	?	YES	NO	?	YES	?	YES
JOB A	5	16	12	4	3	2	18	13	7	4
JOB B	1	19	12	5	0	0	20	16	8	3
JOB C	1	19	18	10	1	3	17	12	8	5
JOB D										
JOB E										
JOB F										
JOB G										
JOB H										
JOB I										
JOB J										
JOB K										

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In addition to the above listing of specific reading material, a review of at least two dozen project reports from various facilities such as: Workshops, Institutional Centers, and Vocational Rehabilitation Centers are included. Organizations represented include Goodwill Industries, AHRC Workshops, as well as State rehabilitation facilities.

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